

Date: _____

To: _____

IRA Trustee/Administrator

Company Name

Address

City, State and Zip Code

RE: Request for Direct Charitable Distribution from Individual Retirement Account (IRA)

Dear IRA Trustee/Administrator:

As provided by the Pension Protection Act of 2006 and as amended in the Protecting Americans from Tax Hikes Act of 2015, I hereby request a direct charitable distribution from my Individual Retirement Account Number _____. I am 70 ½ years or older.

Please issue a check made payable to the Swiss Center of North America in the amount of \$_____ (not to exceed \$100,000) from my Individual Retirement Account Number_____ (your account number), and mail it to:

Swiss Center of North America
507 Durst Road
New Glarus, WI 53574

The Federal Tax ID number for the Swiss Center is 39-1982514. If you need more information from the Swiss Center, please contact Bekah Stauffacher, President, at bekah@theswisscenter.org or at 608-527-6565.

The Swiss Center of North America is a 501(c)(3) organization and is not a donor advised fund or supporting organization. It is my intention that this gift complies with IRC 408(d)(8). My gift will not be placed in a charitable gift annuity, charitable remainder trust, donor advised fund or supporting organization. It is also my intention to have this transfer qualify during the 2026 tax year. Therefore, it is imperative that this distribution be postmarked no later than Dec. 31, 2026. Please include a copy of this letter with the check, and include my name on the check or with other accompanying correspondence, and send me a copy of the transfer for my records.

If you have any questions or concerns regarding this request, I can be reached at the phone number or email address listed below. Thank you for your prompt attention to this matter.

Sincerely,

Your Signature: _____ Your Printed Name: _____

Address: _____

City, State, Zip: _____

Phone Number: _____ E-mail Address: _____